

2010 Individual Income Tax Return Checklist

Did you receive?	Y/N	If Yes, this information is required to prepare your return
Salary/Wages/ Allowances/Pensions		Payment Summaries from all employers and/or government agencies.
Lump Sum/Termination Payments		Payment Summaries and ETP Statements
Interest		For each account: bank/building society name, account number, amount earned.
Dividends		For each share: company name, franked and unfranked amounts, imputation credits. (Or provide dividend notices). Did you incur any costs to earn this income, such as investment loan interest?
Business Income		Details of all receipts & all related expenses and copies of all BAS forms lodged and associated calculations.
Investment Income		Fund name and copy of Annual Tax Advice (as provided by the Fund Manager at year-end)
Income from sale of assets		Capital gains and losses occur on sale of assets such as real estate, shares etc. To calculate any gain/loss, provide the purchase and sale dates, values and associated costs.
Rental Income		Property address, gross rent received, details of all expenses relating to each rental property owned including interest.

Did you spend money on?	Y/N	If Yes, this information is required to prepare your return
Car Expenses		Make, model and registration number of the car used, Log Book where this method is used, and details of expenses, and or distance travelled. Please advise how vehicle was acquired (purchased cash/hire purchase/lease/novated lease).
Other Work Travel		For each trip provide details of travel destinations, purpose of trip, costs of travel & accommodation. If travel is for 6 or more continuous nights, do you have a travel diary or itinerary?
Uniform & Protective Clothing		Provide receipts for all items purchased or repaired during the year.
Laundry & Dry Cleaning Expenses		For professional dry cleaning & laundering, provide receipts. For home laundry, provide estimate number of work wash loads per year.
Income Protection Insurance		Details of Policy type and premiums paid during the year.
Sun Protection Items		If you are an outdoors worker you are entitled to claim for sun protection items such as sunscreen etc.
All Other Work- Related Expenses		Details of all expenses incurred in relation to your occupation.
Gifts/Donations		Details of charitable organizations and the amount of each donation.
Self Education		Courses of study undertaken and details of all associated expenses.
Private Health Insurance Policy		Name of health fund, membership number and type of cover (ie hospital/ancillary/combined). Please provide annual tax statement received from Health fund.
Net Medical Expenses over \$1500		Details of all medical expenses and any refunds or reimbursements received from Health Funds.
Education Tax Refund		Expenses including computer, home internet, stationery and textbooks